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Appendix A

Review of Agency Management Training

28 February 1964

MEMORANDUM FOR: Deputy Director (Support)

SUBJECT : Review of Agency Management Training

I. INTRODUCTION

This report is for information only. It was compiled in answer to your request of 16 January 1964. It reviews the history of management training in the Agency, indicates its current situation and future prospects. Attached charts show the trend of enrollments and the distribution by components.

II. HISTORY

25X1A A. Management training in the Agency was begun by [] with the so-called Human Resources Program, a 4 1/2 - hour conference which was attended by many senior officials in the Agency. The first management course was given by [] in January 1954. It was a 40-hour course given part-time for two weeks. It surveyed processes and problems of supervision and mid-management for support personnel. Although it used some cases, it was primarily a lecture course which featured presentations by the Auditor-in-Chief, the Director of Personnel, and six other guest speakers.

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B. By August 1954 a course in supervision was being planned for people directly in charge of working level groups. The course plan emphasized the traditional functions of directing, coordinating, planning, and controlling. In the fall of 1954 basic courses in supervision and management were being given by [redacted]

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[redacted] left the Agency in 1955.

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C. From this beginning until the present day the management training has been given by three instructors except for 1962 when there were four and 1963 when there were two. Chart I shows periods of service of the various instructors to date.

D. Beginning in 1956 and for several years thereafter the scheduled offerings were considerably augmented by a number of special courses requested by various components such as ORR, SR, OSI, and the Office of Communications. These courses were not essentially different from the regularly scheduled ones but were tailored to some extent to meet special requirements.

E. Over the years the training techniques have gradually changed in the direction of eliminating lectures and introducing active learning. In December 1957 the use of textbooks was abandoned and the reading of selected articles substituted. By 1958 films were being used as cases and illustrative material, and several films were made by [redacted] of OTR, one of which is still being used. Also in 1958 a very successful innovation was introduced, namely the "In-basket Exercise" which was developed by the A&E Staff of OTR in conjunction with outside consultants. This "In-basket Exercise" is still in use. Also, at this time role-playing became an important technique of instruction.

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F. In September 1959 Colonel White's expressed interest in the development of a senior management seminar led to the two-week seminar given by Professor [redacted] for senior Agency managers [redacted] in October 1960 and again in October 1961.

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G. In June 1961 a similar seminar conducted by [redacted] was offered for a slightly lower level (GS-14 and 15). It was offered again in June 1962 and June 1963.

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25X1A H. In May 1961 the first full-time course was given, but courses were generally part-time until the fall of 1963 when the policy was inaugurated of having all management and supervisory courses on a full-time basis. At this time the decision was also made to take all courses for GS-11 and above either [] because of the greater effectiveness of the training given away from the distractions of home and office. Throughout the years, the courses have normally been of 40-hours duration.

III. ENROLLMENT

A. Chart II shows the number of employees who have taken any kind of management training since January 1955. This chart was compiled from a machine run of training records of currently employed individuals; training has been credited equally regardless of the length of any particular program, or the particular subject matter. External courses are counted equally with OTR courses in supervision and management. We do not have statistics on the number of supervisors and managers in each component, but it is obvious that some areas have not taken advantage of training opportunities.

25X1 B. DDP employees are shown in their present component, not in the one which entered them in training. This makes some difference in relative showings. For example, SR Division shows as of the end of 1963 [] GS-12's and above with some kind of management training, whereas a similar study in December 1962 showed [] 25X1 [] GS-12's and above in SR. Perusal of the chart shows the varying patterns associated with different offices, some going in heavily for the training of the lower grades and others concentrating on the higher levels.

C. Chart III shows the enrollment in OTR management and supervision courses over the past nine years. It is based on actual class rosters. (A statistical breakdown by courses for the years 1959-63 is also attached.) A drop-off became apparent in 1959, and there has been a slow decline since except for a slight pick-up in 1963. The drop-off in 1959 and again in 1961 shows up most clearly in the graph of the supervision courses. The drop-off in 1961 may possibly be related to the cancellation of the "five percent" regulation in 1960.

The chart also shows a considerable decrease in DDI participation from 1960 on. (The total number in Chart III is larger than in Chart II because Chart II shows only people currently employed and counts each person only once regardless of the number of courses taken, but Chart III includes people no longer employed and each course taken is counted.) Chart III also shows that in 1963 enrollment was up from all components except DDP even though there were only two instructors during this year in contrast to the preceding year when there were four.

D. The records reveal some rather startling statistics which do not appear in the charts. In OTR management training (disregarding

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[REDACTED]

1. OCI has not entered a student since 1956;
2. Since 1957 only one student has been entered from the CI Staff;
3. WE Division has entered two students since 1957;
4. WH Division has entered three since 1958;
5. After 1958 only two came from the PP Staff and only one from the IO Division;
6. The Africa Division has entered one since 1960.

E. In OTR supervision courses:

1. OCI has entered only four students since 1959;
2. Other than RI Division there have been only seven students from DDP since 1960.

F. The charts demonstrate the low degree of participation by DDP over the years, a chronic situation which was noted as early as 1955 [REDACTED] It is true of external offerings as well as internal ones. Not even the senior seminars had drawing power; in the last seminar conducted by [REDACTED] there were only four students

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25X1A from DDP, and the [] seminars were given up when it became established that DDP participation could not be counted on. The cause is not readily identified. In part it is related to the views of some senior officials who fail to recognize that such training has any validity, relevance or necessity. We instructors have occasionally heard from DDP employees that they would like to get management training but that either they were not aware of the management offerings or that they were unable to get permission to take the courses. It has been frequently said that the Clandestine Services are too hard pressed to be able to spare anyone for this type of training, but the Office of Communications, also hard pressed, has made a regular policy of putting their people through management and supervision courses and has even requested special courses for particular groups.

25X1A G. In December 1961 [] initiated an effort to work out an operations management course tailored to assumed DDP needs. This did not get beyond the talking stage, and there is no indication that it would have been accepted. In October 1962 Mr. [] expressed interest in a course of three or four days duration which might be given to all DDP branch chiefs. At his request, a proposal was submitted, but no reply or comment was ever received and no action ever taken.

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IV. COURSE CONTENT AND TECHNIQUES

25X1A A. Many books and innumerable articles have been published about management training, but there has never been any agreement as to methods or content. From the time of [] OTR training has increasingly centered its attention on the management of people, which seems to be the critical problem, and gradually eliminated the study of such topics as work methods, office and records management, and theory of organization, for which there has been no demand in our programs. Our courses currently are centered on problems of leadership, communication, motivation, and decision-making.

B. There is good reason to doubt the lasting effect of conventional teaching in this field. Published reports show that many training programs have had only temporary effect on the students, who accept the content of the programs but are not really able to change their habitual

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ways of thinking and doing. We have found that many students are unable to relate theoretical considerations and outside cases to their own situation. They have followed the course closely, analyzed the cases astutely, but their managerial behavior was actually changed in no way by the training. In these cases, the influencing of attitudes becomes more important than the imparting of knowledge or the teaching of skills.

25X1A C. Others are unable to practice what they have learned because of the managerial climate in their unit as set by their boss. Most professional trainers have come to believe that management training cannot be effective unless it starts with the top managers and proceeds down. To this extent [] was correct in attempting to indoctrinate the top managers in CIA with his Human Resources Program before commencing any other training. The most common remark our students make is, "I wish my boss would take this course."

25X1A D. The "Case Method" has increasingly been used in OTR training, in large part because of its effect on attitudes and insights. We instructors got many valuable tips from watching Professor [] and [] use this method. Without going into an analysis of the case method it may be said that although we still believe it has considerable merit, we have come to have some doubts about it. In too many instances case discussions have been simply an exchange of views, with no real impact on the students. We have experimented with Agency cases, State Department cases, business cases, and have rewritten some in an Agency setting. While the business cases often seem too remote to the students, the Agency cases seem equally remote to some and have too many emotional associations for others.

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E. Our experience shows that the students learn most from active situations and exercises. For example, the "Communication Game" has been used very successfully for a number of years to drive home certain valuable lessons. We do not know of a better exercise of this type anywhere in government or in business training circles. We instructors administered this exercise for the Industrial College Faculty in the summer of 1963 where it was very well received.

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F. We have also used "Role-playing" in varying degrees. This is a technique which is much used by management trainers. Students who get drawn into role-playing usually feel that this was the most valuable part of their training.

G. Our "In-basket Exercise" is given to all classes except the GS 5-10 level. This is an exercise not in the pushing of paper but in the analyzing of problems and coming to decisions on a variety of managerial situations. This exercise is usually regarded as the highlight of our course by most students, and we have been experimenting with techniques to expand its effectiveness. We believe our in-basket is superior to that used by the Veterans Administration and other organizations.

H. We have also looked into the matter of using a computerized managerial game. Discussions have been held with System Development Corporation on their simulation programs. This technique has become quite popular in business management training and is being used by the Army Management School as well. It is our belief that such a game would be quite valuable as an instructional device; however, it might cost as much as \$50,000 in consultant fees to develop.

I. The most effective approach we have come across up to now is the so-called "Managerial Grid" originated by Professor Blake at the University of Texas and used by him very successfully in some large corporations. This is a five-day program in which the instructor guides the activities of the students in small groups. It embodies active learning about management with very little theory, and the students find out a great deal about themselves, the way they affect other people, and the way they can get things done. In the last Mid-Career Course gave a one-day synopsis of the "Managerial Grid"; the students found this extremely worth while and wanted to know more. We tried the same thing with a group of GS-11's and 12's recently, and again it seemed to have very considerable impact. While the "Managerial Grid" does not cover all facets of management, we are beginning to believe it is the method most likely to have genuine and lasting training value.

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V. CURRENT PLANS

A. We are now proposing to stage a five-day seminar for GS-15's and 16's in May to consist entirely of the "Managerial Grid". If this proves to be as successful as we have reason to expect, we shall then propose that this be the pattern of management training in the future at all levels. As the work load permitted, we would then like to make special offerings on selected topics to the extent possible as refresher or advanced programs for those who have had basic management training.

25X1A B. We also would like to develop some ideas we have for films. Talks have been held with [] regarding the production of one or more films in the general area of Agency supervision and management. It is our belief that the first of these films might very well deal with the topic of fitness reports.

C. Another project we have had in mind for several years has been a lecture series to be held in the Headquarters Auditorium, but this has been kept in abeyance as long as we had only two instructors. We are now inclined to doubt the value of such a program, especially if it costs money.

D. Another current activity is our participation in the Mid-Career Course. Our one-week presentation in the first of these classes, though not unsuccessful, did not really belong in this course as neither the method nor the content fitted well into the general conception of the course. For the second running our contribution was cut to three days, a substantial portion of which was devoted to the "Managerial Grid." This presentation was much more successful, but there is still substantial doubt in our minds as to the appropriateness of a management phase in this course. We are currently of the belief that basic management training should be a prerequisite for the Mid-Career Course which should then include a few discussions of Agency management by top managers within the general context of discussion of other Agency problems.

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VI. COST AND T/O

A. As shown in Chart I, management training has operated over the years with three instructors, with the exception of 1962 when there were four and of 1963 when there were only two. At the present scale of activity four instructors are hardly needed, but the load is rather heavy for two and there is little opportunity for development of new materials and methods. A staff of two also represents no reserve; if one should get sick, it might be necessary to cancel a course. Two instructors might be sufficient if most of the teaching follows the "Managerial Grid" scheme of instruction since it does not require very heavy participation by the instructors. On balance a staff of three instructors seems about right.

B. Ideally, it would be desirable to have as instructors one careerist from DDI, one from DDS, and one from DDP. Throughout 1963 an unsuccessful attempt was made to obtain an instructor from DDP. Of our current staff one instructor is from DDI, one from DDS&T, and one from OTR. There has been evidence of reluctance to participate in this kind of instruction because of a feeling that it is something of a blind alley which will not forward one's career.


25X1A C. While we feel that our instruction is good, we wish to point out that it is very difficult to find experienced instructors with a background in professional management. Of the six instructors added to the staff since 1959, only one [] had experience in teaching previously, and their managerial training and background were "spotty" at best.

25X1A D. To abolish the staff and conduct this instruction by contract or by external training would be much more expensive than the present arrangement and in our view less effective for most employees. Nevertheless, a certain amount of contracting will be necessary in any case if we are to pursue this "Managerial Grid", inasmuch as that material is copyrighted and closely controlled. If this method proves to be as good as we expect, we believe we can come to some arrangement with the originators of the material. While it might be necessary to bring [] Dr. Blake for the senior level of the Agency, this instruction could be handled for other levels by the present staff.

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F. The staff currently consists of three GS-15's and one GS-8. A GS-6 slot was eliminated by us as unessential at the end of 1962. A total staff of three in 1963 taught as many students as a staff of six did in the preceding year. While the present teaching staff is able to handle the current and projected load, any dramatic upswing probably would necessitate some adjustment in T/O and in program. We prefer to delay any recommendations until after we see how well [redacted] seminar on the "Managerial Grid" is received next May.


Chief, Management Training Faculty, IS/TR

CONCURRENCE: /s/ 2 March 1964
Director of Training Date

25X1A OTR/IS/[redacted]mam (28 February 1964)

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